

Classification Title	Branch/Division/Bureau
Special Consultant	Rate Regulation Branch/Rate Filing Bureau
Working Title	Office/Unit/Section/Geographic Location
Rate Regulation Branch Consultant	Los Angeles
Position Number (13 Digit)	Conflict of Interest Position <input type="checkbox"/> NO <input checked="" type="checkbox"/> YES
413-323-4660-XXX	
Employee Name	Effective Date

BASIC FUNCTION:

Under direction of the Division Chief or Supervising Insurance Rate Analyst, the rate Regulation Branch Consultant will review worksheets and written recommendations to assure timely completion of rate filings, accurate analysis, and a high-quality work product, and analyzing filings containing rates, rating plans, rating systems, manual rules, and policy forms to ensure accuracy of data, the impact on rates, appropriateness of forms, and compliance with California Insurance Code and California Code of Regulations. Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.). Travel may include overnight stay

This position is designated under the Conflict of Interest Code. The position is responsible for making or participating in the making of governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of appointment. Failure to comply with the Conflict of Interest Code requirements may void the appointment.

ESSENTIAL FUNCTIONS

- 35% Reviews applications to verify receipt of filings on the Public Notice List and assign to team members equitably. Monitors each analyst progress to ensure completion of filings within prescribed time frames. Mentors and counsels individual team members. Reviews worksheets prepared by analysts for completeness of evaluations and accuracy of decisions, suggesting revisions. Consults with Bureau Chief, Division Chief, Deputy Commissioner, staff actuaries, and Rate Enforcement Bureau. Counsels analysts on strategy for contacting filers regarding deficiencies and acceptable corrective actions.
- 35% Prepares rating templates or related analytical spreadsheets to quantify reasonableness of rating requests submitted by insurers. Prepares correspondence to request additional information and data from insurers in support of rate filing applications. Communicates and corresponds with insurers to resolve filing deficiencies. Complies with Insurance Code requirements, regulations, and policy memos. Completes the rate filing recommendation in the Rate Regulation Tracking System (RTTS).

ESSENTIAL FUNCTIONS DUTY STATEMENTHRM-025

- 15% Communicates intradepartmental activities on the rate approval process through interaction with various branches. Handles inquiries from other bureaus and divisions within the CDI and responds to inquiries from companies regarding filing status and requirements. Assists at the Public Viewing Desk to provide technical assistance regarding difficult and complicated inquiries. Performs duties in the absence of the Bureau Chief.
- 10% Conducts regular team meetings to relay information from management, encourages suggestions and comments from team members on various issues. Improves RRB systems, procedures and maintains good communication with team members. Suggests and provides study materials, classes, and technical training on filing analysis, regulations, insurance products and ratemaking. Provides input to Bureau Chief on overall performance of team members.

MARGINAL FUNCTIONS

- 5% Leads individual or group projects as assigned by the Bureau Chief, or Branch management.

WORK ENVIRONMENT OR PHYSICAL ABILITIES

Work Environment:

- Work in a high-rise office building

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety Analyst.)

Employee Signature

Date

Printed Name

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Supervisor Signature

Date

Printed Name